

# IU RETIREMENT PLAN INVESTMENT COMPANY CHANGE FORM

## Participant Information

Name: \_\_\_\_\_ Employee ID#: \_\_\_\_\_

Campus Address: \_\_\_\_\_

Campus Phone #: \_\_\_\_\_ Email Address: \_\_\_\_\_

## Procedure

A participant in the IU Retirement Plan must complete this form to change the investment direction of future contributions made to the IU Retirement Plan on his or her behalf.

To effectuate a change in the investment direction of future contributions made to the IU Retirement Plan on a participant's behalf, a participant must:

- 1) Establish (or have previously established) an IU Retirement Plan account at the applicable investment company by completing an investment company account application;  
Please Note: A participant with a current investment company account under the IU Retirement Plan is not required to complete a new investment company account application.
- 2) Complete this form; and
- 3) Return a completed IU Retirement Plan Investment Company Change Form and investment company account application (if applicable) to the campus Human Resources office no later than 30 days prior to the next pay date.

The campus Human Resources office will process the change in investment direction as soon as administratively feasible, once it receives a completed IU Retirement Plan Investment Company Change Form and an investment company account application (if applicable). In no event, will the change become effective retroactively.

## Employee Acknowledgment

- I authorize Indiana University to remit any future contributions that may be made to the IU Retirement Plan on my behalf to be invested at the designated investment company indicated below.
- I acknowledge that this investment direction applies only to future contributions not yet made to the IU Retirement Plan on my behalf.
- I acknowledge that this direction will remain in effect until I change it. I may change this agreement only by providing a new IU Retirement Plan Investment Company Change Form to my campus Human Resources office no later than 30 days prior to my next pay date.
- I acknowledge that Indiana University does not warrant the performance or the appropriateness of any investment.
- I am aware of the fees and expenses charged by the designated investment companies.

## Employee Direction

I direct all future contributions that may be made to the IU Retirement Plan on my behalf to be invested at the following investment companies in the percentages indicated (combined percentages must total 100%):

\_\_\_\_\_ % TIAA-CREF                      \_\_\_\_\_ % Fidelity Investments

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

A participant should make a copy of the completed form for his or her records prior to returning it to the campus Human Resources office.

HR USE ONLY:

Received by: \_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_